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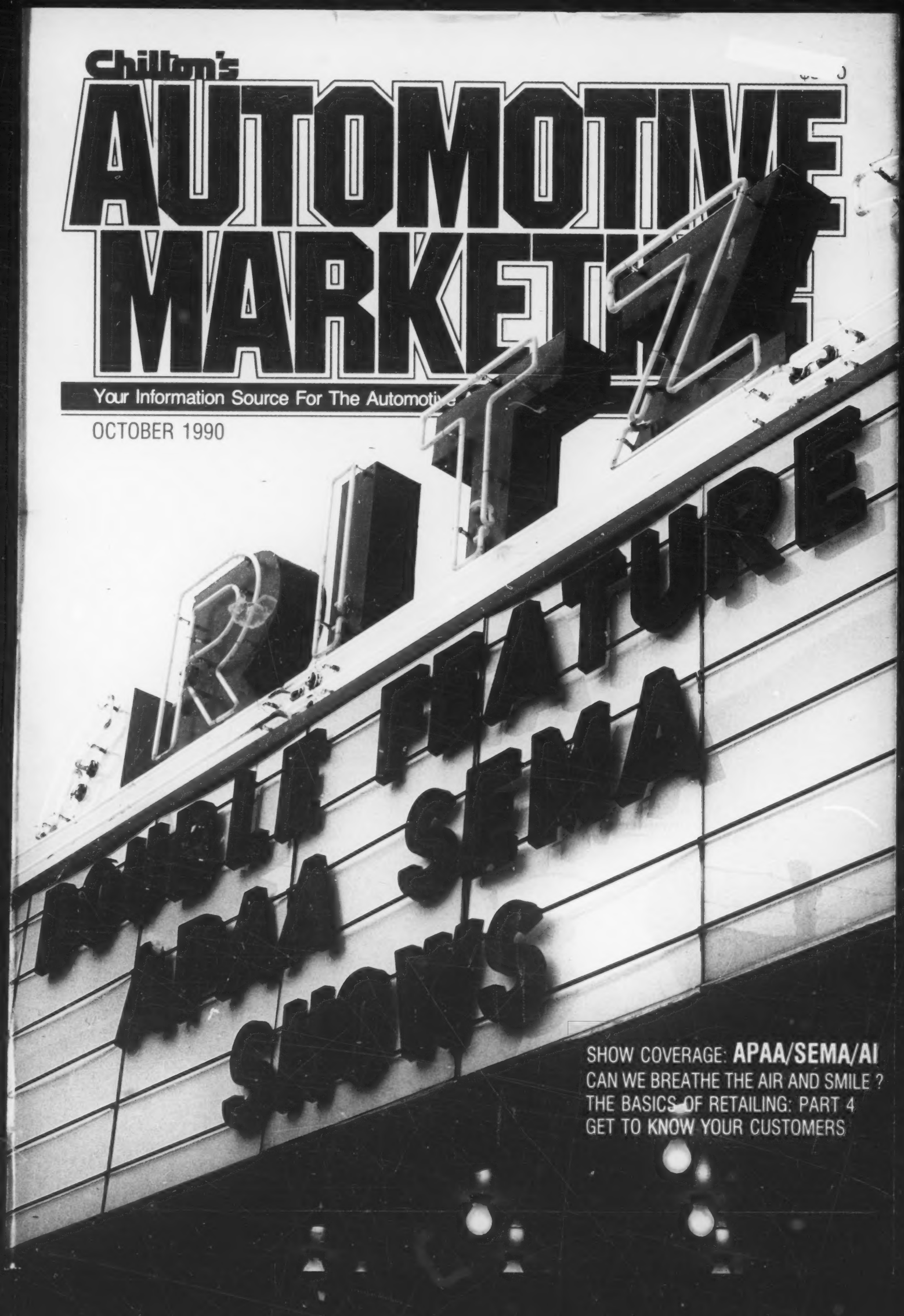

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CAN WE BREATHE THE AIR AND SMILE ?
THE BASICS OF RETAILING: PART 4
GET TO KNOW YOUR CUSTOMERS

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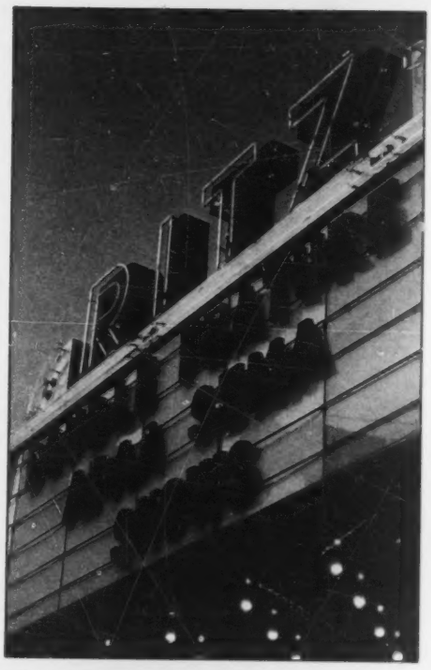
AUTOMOTIVE MARKETING

October Issue/Volume 19, Number 10



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MARKET LINE

The Two Groups That Matter: Serious DIYers & Enthusiasts

With all the talk about possible gas shortages and rising prices, and the concerns about inflation and recession, we thought it was time to reexamine two consumer groups that are prime automotive customers: serious, hard core DIYers and automotive enthusiasts. Hard core DIYers boost parts sales, while enthusiasts boost accessory sales.

For parts sales, consider the serious DIYer. Kent Brown, president of Nationwise, Columbus, OH, calls him Clyde Crankshaft. "He's the heavy user that buys parts," Brown said. "He wants quality parts and advice. He's only 15% of our customer base, but he represents 40% of our parts sales."

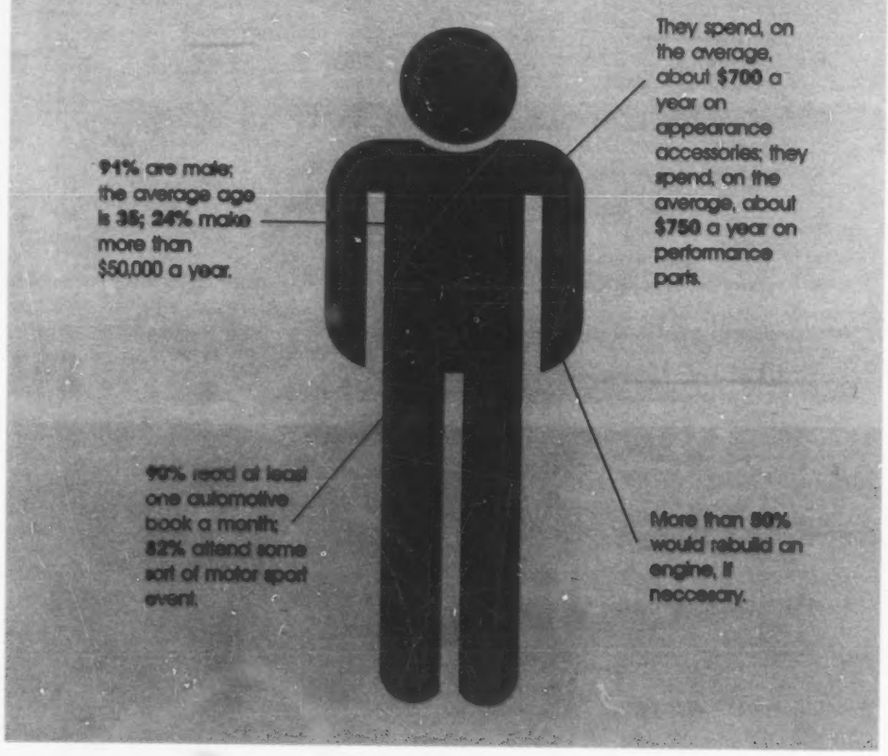
The Serious DIYer

We've identified the serious DIYer on our continuing *Consumer Automotive Repair Studies (CARS)* as someone who spends more than 11 hours a month on automotive DIY work. Slightly less than one DIYer in ten falls into this category. On five *CARS* studies since 1984, this percentage has remained roughly constant: one in ten. It's a small number, but serious DIYers account for a substantial amount of DIY work. As our charts show, hard core DIYers purchase and install parts and accessories at a rate 10% to 20% higher than the average *CARS* DIYer.

The serious DIYer is overwhelmingly male (only one in ten *of these one in ten* is female), and more than half of them work

THE ENTHUSIAST

A survey compiled by Burroughs & Associates, Nashville, TN, of 5,000 people who said they were car enthusiasts shows some interesting bits of information on targeting these customers.


91% are male; the average age is 35; 24% make more than $50,000 a year.
They spend, on the average, about $700 a year on appearance accessories; they spend, on the average, about $750 a year on performance parts.
90% read at least one automotive book a month; 82% attend some sort of motor sport event.
More than 80% would rebuild an engine, if neccesary.

THE ENTHUSIASTS' AGE

The enthusiast market is a young market. The average age is 35.

Age	% Of Enthusiasts
Under 25	23%
26-35	29%
35-50	39%
Older Than 50	9%

Source: Burroughs & Associates, Nashville, TN

THE ENTHUSIASTS' INCOME

This is a rich market. Almost half the enthusiasts have household incomes above the national average of about $36,000.

Household Income	% Of Enthusiasts
Under $20,000	10%
$20-$35,000	33%
$35-$50,000	26%
More Than $50,000	24%

Source: Burroughs & Associates, Nashville, TN

WHERE DO ENTHUSIASTS BUY PERFORMANCE PRODUCTS & APPEARANCE ACCESSORIES?

The enthusiasts shop auto chains for price and convenience, not by choice, according to Burroughs. Availability and brand selection keep them coming back.

Outlet	% Of Enthusiasts
Auto Chain	34%
Full-Line Auto Store	32%
Speed Shop	28%
Mail Order	27%
Discount Chain	19%
Car Dealers	12%
Tire Dealers	10%
Department Store	5%

Source: Burroughs & Associates, Nashville, TN

at traditional blue collar jobs. For example, the single largest occupational group is craftsmen. The serious DIYer is younger than the remaining 91% of the *CARS* study, late 20s to early 30s, and he makes less money on the average.

THE SERIOUS DIYERS' AGE

The serious DIYers are young. Some 59% are under 35-years-old.

Age	% Serious DIYers	% Rest Of CARS DIYers
Under 18	NA	3%
18-24	23%	11%
25-34	36%	25%
35-44	25%	19%
45-54	8%	14%
55-64	3%	13%
Older Than 65	5%	15%

Source: *Automotive Marketing's 1990 Consumer Automotive Repair Study (CARS)*

THE SERIOUS DIYERS' INCOME

Many serious DIYers have low incomes, which may be one reason they are serious DIYers.

Income	% Serious DIYers	% Rest Of CARS DIYers
Under $20,000	33%	25%
$20-$30,000	18%	19%
$30-$50,000	36%	33%
More Than $50,000	10%	17%

Source: *Automotive Marketing's 1990 Consumer Automotive Repair Study (CARS)*

THE SERIOUS DIYERS' EMPLOYMENT

More than half of serious DIYers work blue collar jobs.

Job	% Serious DIYers	% Rest Of CARS DIYers
Professional	12%	21%
Clerical	9%	9%
Managerial	7%	9%
Sales	3%	5%
White Collar Total	**31%**	**44%**
Craftsmen	28%	14%
Operatives	10%	4%
Laborers	6%	2%
Transport	4%	2%
Service	3%	4%
Blue Collar Total	**51%**	**26%**
Retired	5%	10%
Students	5%	4%
Armed Forces	3%	1%
Housewives	*	4%
Farmers	*	1%
Other Total	**15%**	**20%**

Source: *Automotive Marketing's 1990 Consumer Automotive Repair Study (CARS)*
* Less Than 1%

These are prime considerations for DIY activity. Previous studies have shown that DIY work decreases with age and increased income. However, the 1990 serious DIYers were slightly older than 1985 serious DIYers.

The serious DIYer owns 2.05 vehicles and is responsible for the maintenance of these vehicles and that's what matters. Of these cars, 39% are more than ten years old, a full 15% higher than the rest of the *CARS* study. That means there's more chance to do DIY work.

So, of our serious, hard core, DIYers, 97% did oil changes, more than 80% installed antifreeze and filters, and 69% did some sort of tune-up work during the past 12 months. And, when it comes to more complex DIY work, such as brakes, shocks, and exhaust, the percentage of serious DIYers doing the jobs was two to three times that of the rest of the *CARS* study.

Gasket DIYers

We do not question *CARS* DIYers about the most complex DIY tasks. One of the more complex jobs is gasket installation. Anyone who replaces a gasket while doing a valve job, for instance, is apt to be a fairly serious DIYer. Ken Lehman, co-chairman and chief sales and marketing officer of Fel-Pro, Skokie, IL, recently reviewed some Fel-Pro research that tells us more about the hard core DIYer.

Fel-Pro attaches questionnaires to its gasket packages and asks buyers to return them. Last year, 21% of the returns were from DIYers, although Lehman warned that DIYers have more time to complete the Fel-Pro survey than professionals. However, if returns are limited to repairs done outside a professional facility, DIYers account for 41% of repairs.

"We noted that DIYers buy the majority of their gasket sets at jobbers, but slightly more than 40% were purchased at retail outlets. Surprisingly, 10% of professionals working on the job, also bought gaskets at retail auto stores as opposed to jobbers," Lehaman said.

The keys to sales are: quality, availability, and price, in that order. "Even price conscious DIYers," Lehman noted, "don't want to gamble on lesser quality gaskets."

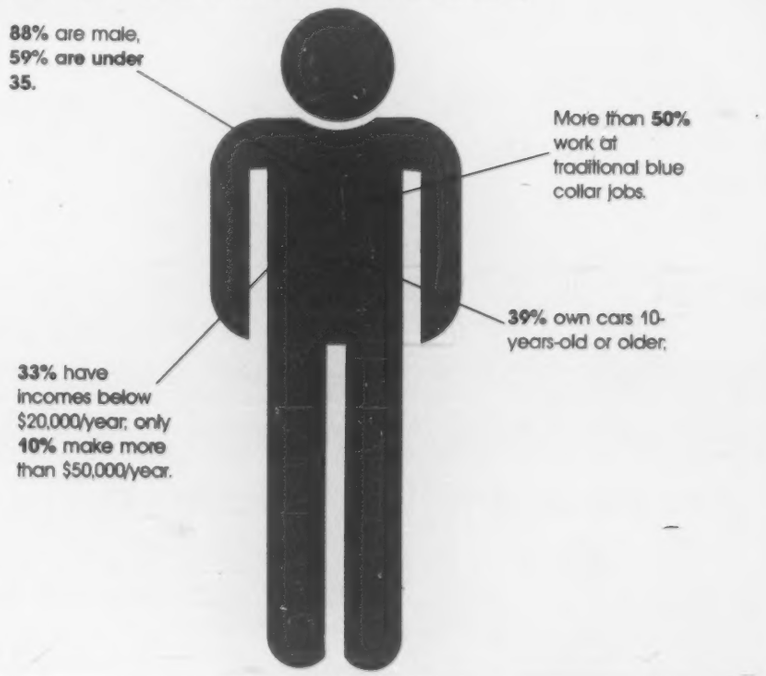
The serious DIYer shops auto stores 39 times a year on the average. More than half expect to increase their DIY involvement. Body work and engine rebuilding were the jobs they want to learn.

So for retailers who want to compete for the serious DIYer, the answer is simple: sell quality and availability to serious DIYers, just like jobbers do.

THE SERIOUS DIYER

The serious DIYer, someone who spends more than 11 hours a month on automotive DIY tasks, is an important target for automotive marketers. Although serious DIYers make up only 8.5% of the latest *Automotive Marketing Consumer Automotive Repair Study (CARS)*, they account for much higher percentages of work and sales.

In all the charts that follow, serious DIYers (8.5% of the survey group) are compared with the rest of the *CARS* DIYers (the 91.5% of the survey that are not serious DIYers).


88% are male, 59% are under 35.
More than 50% work at traditional blue collar jobs.
39% own cars 10-years-old or older.
33% have incomes below $20,000/year; only 10% make more than $50,000/year.

MARKET LINE

ENTHUSIAST EMISSIONS CHECK

The performance market has declined due to emissions testing. Burroughs asked the enthusiasts whether or not they'd tampered with the emissions system. Half had tampered with it.

Tampered	% Of Enthusiasts
No	48%
Removed Some Of It	31%
Removed All Of It	20%

Source: Burroughs & Associates, Nashville, TN

ARE ENTHUSIASTS DIYERS?

Yes, they are. And here's what jobs they do.

Job	% Of Enthusiasts
Oil Changes	94%
Replace Plug Wires	89%
Tune-Up	87%
Brake Repair	82%
Install Headers	67%
Install Shocks/Struts	62%
Change Camshaft	59%
Replace Fuel Injectors	28%
Install Aerodynamic Kit	22%
Replace On-Board Computer	20%

Source: Burroughs & Associates, Nashville, TN

WHAT JOBS DO ENTHUSIASTS DO?

Burroughs asked the enthusiasts to describe what kind of work they do. Almost half would, or felt capable of, rebuilding an engine.

Job	% Of Enthusiasts
Very Light: Do few or no jobs	9%
Light: Change plugs, coil, wires	17%
Medium: Change carburetor, manifold, headers	22%
Heavy: Rebuild complete engine	52%

Source: Burroughs & Associates, Nashville, TN

HOW MUCH DO ENTHUSIASTS SPEND ANNUALLY FOR APPEARANCE PRODUCTS?

The enthusiasts are also willing to spend money for appearance products.

Amount	% Of Enthusiasts
Under $100	20%
$101-$ 200	12%
$201-$ 400	15%
$401-$ 600	15%
$600-$1,000	15%
More Than $1,000	23%

Source: Burroughs & Associates, Nashville, TN

HOW MUCH DO ENTHUSIASTS SPEND ANNUALLY FOR PERFORMANCE PRODUCTS?

The enthusiasts are willing to spend a lot of money for performance products.

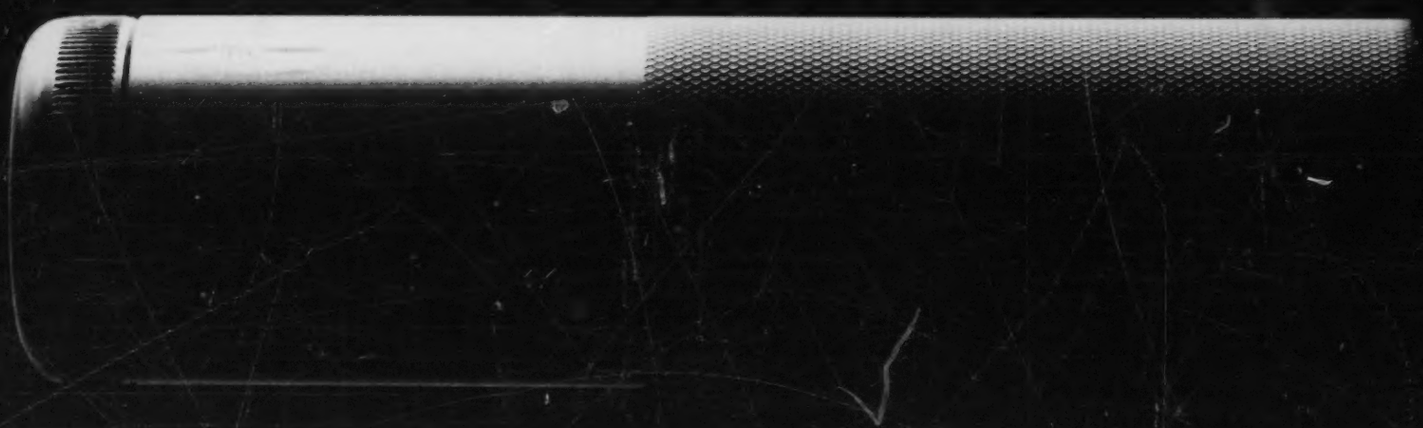
Amount	% Of Enthusiasts
Under $100	21%
$101-$ 200	11%
$201-$ 400	13%
$401-$ 600	14%
$600-$1,000	17%
More Than $1,000	24%

Source: Burroughs & Associates, Nashville, TN

Selling The Enthusiast

The enthusiast is as important as the serious DIYer. Some people have thought, however, that auto enthusiasts are bound to the specialty auto stores. But that's not true, according to the results of several studies by Mike Burroughs of Burroughs & Associates, Nashville, TN, a high performance oriented ad shop. Fully 34% of the 2,000 enthusiasts surveyed bought performance or appearance items in auto chain stores last year.

IT MOVES AT THI



Lately, it seems the number of people buying rugged, reliable Mag-Lite® flashlights for use in their cars has been accelerating like crazy.

For good reason. Mag-Lite® sales are being fueled with a multi-million dollar advertising campaign. And with the demand for quality becoming a major factor among consumers in automotive accessory purchases, there's no sign Mag-Lite® will be slowing down any time soon.

Performance in the retail marketplace is just

MARKET LINE

"Why shouldn't they buy from auto chains?" Burroughs asked. "The chains offer better hours and convenience." But, he noted, enthusiasts ranked chains almost ten points lower when asked where they preferred to buy. "The enthusiast want a place where he perceives they have knowledge about what he's buying, and chain stores are usually not so good with technical advice and depth."

WHAT DO SERIOUS DIYERS WANT TO DO NEXT?

Serious DIYers want to do more automotive tasks; many of them want to learn how to do body work and engine rebuilding.

Task	% Serious DIYers
Body Work	18%
Rebuild Engine	16%
Rebuild Transmission	11%
Tune-up Work	10%
Electrical Work	6%
Brake Work	5%
Fuel Injection Work	3%

Source: Automotive Marketing's 1990 Consumer Automotive Repair Study (CARS)

Still, Burroughs concluded, talking about mail order sales (which also ranked high), the enthusiast wants the best price, availability, and brand selection.

COMPARISONS: SERIOUS DIYERS VS. ALL OTHER *CARS* DIYERS

By far, those we call serious DIYers out shop other DIYers—they shop for auto parts almost every other week. And, not surprisingly, serious DIYers own more vehicles.

Activity	% Serious DIYers	% Rest Of CARS DIYers
Own Cars 10-Years-Old & Older	39%	24%
Enjoy DIY "A Lot"	46%	19%
DIY Activities Increasing	54%	33%
Expect DIY Activities To Increase	50%	22%
Times Shopped Auto Store Per Year	39.0	17.0
Number Of Vehicles Responsible For	2.05	1.83

Source: Automotive Marketing's 1990 Consumer Automotive Repair Study (CARS)

If that sounds familiar, it should. Brand selection, availability, and price—that's what it takes to compete for the en-

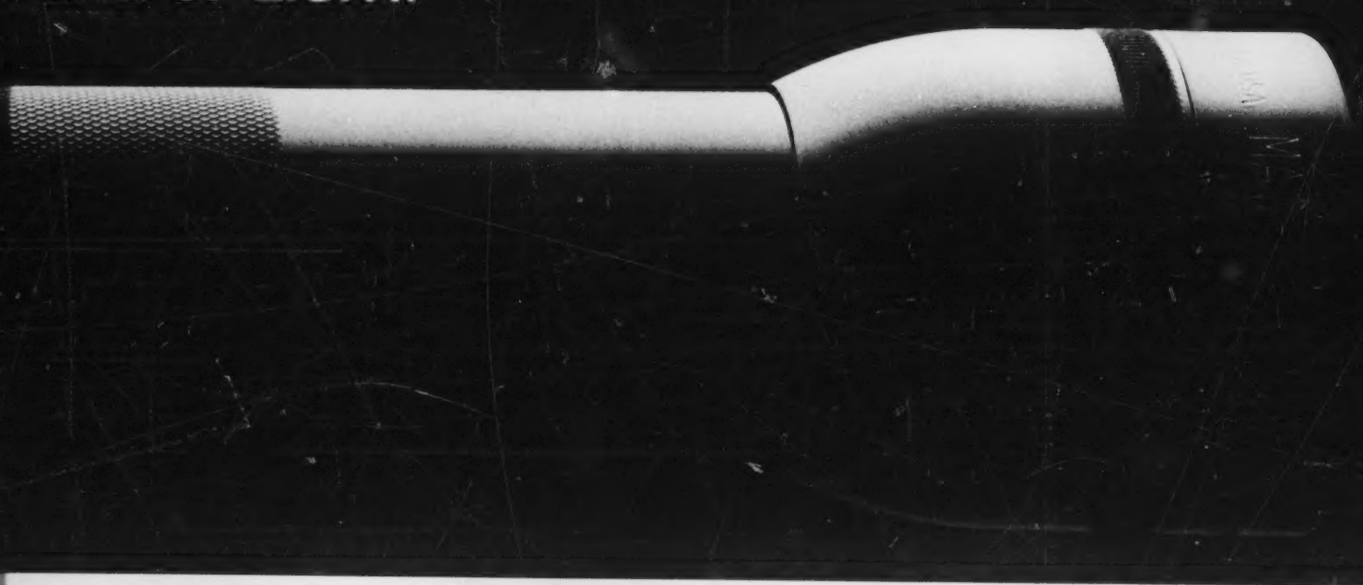
WHAT SERIOUS DIYERS DO

Serious DIYers do all jobs at a much higher percentage than the rest of CARS DIYers.

Job	% Serious DIYers	% Rest Of CARS DIYers
Change Oil	97%	80%
Install Antifreeze	85%	61%
Install Filter	82%	61%
Install Tune-up Parts	69%	36%
Replace Brake Pads	37%	15%
Replace Shock/Strut	30%	10%
Exhaust System Work	14%	7%
Install Car Sound	43%	10%
Body Repair Work	27%	8%
Install Custom Wheels/Tires	24%	6%
Install Electronic Accessories	17%	7%

Source: Automotive Marketing's 1990 Consumer Automotive Repair Study (CARS)

PEED OF LIGHT.



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thusiast market where consumers spend an average of $700 on appearance accessories and $750 on performance parts.

There are some distinct differences between serious DIYers and enthusiasts. Enthusiasts are older (average about 35), and better off financially. Almost a quarter of the enthusiasts has an income of more than $50,000.

As our charts suggest, enthusiasts do just as much DIY work as serious DIYers when it comes to routine maintenance. And, 52% are willing to rebuild an engine. In fact, Burroughs research suggests that about half of this group would blueprint an engine from the crankshaft on up.

On the enthusiast side, some 24% reported they'd spent more than $1,000 in the past year on their vehicles. While we have no comparable figures for the serious DIYer, we do know that 39% of DIYers bought between 15 and 18 different automotive products last year.

Serious DIYers and serious automotive enthusiasts make up a serious market. ■

CONSUMER RESEARCH

Must-Know Men Like Automotive DIY

A new research study done for *Popular Mechanics* magazine, New York, finds that 13.3 million men, about a quarter all adult males, fall in a category the magazine calls "Must-Know Men."

The study, "The Must-Know Market of the 1990s: The American Man's Need to Know How and Why Things Work," was conducted by Yankelovich Clancy Shulman, Westport, NY.

The Must-Knows

The key finding, according to *Popular Mechanics*, "Must-Know Men are defined as adult males who are curious about how and why things work, actively involved in making and fixing things, and eager to share their knowledge. These men are widely recognized by others as a main source of information and advice about products and brands."

Working from information drawn from six nationwide focus groups, the study questioned 1,500 men on interests, involvements and attitudes. The results, researchers say, show that Must-Know Men span all income, educational and occupational levels.

However, nine distinct factors identify the Must-Know Man:

- He wants to know how things work, is mechanically inclined;
- He wants to know the latest developments in technology;
- He is a do-it-yourselfer;
- He is interested/involved in automobiles;
- He is interested/involved in home repairs and maintenance;
- He is interested/involved in outdoor activities;
- He is interested/involved in computers and electronics;
- He is interested in science, space travel and defense technology;

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MARKET LINE

Plasti-Kote Paint Display Is Point-Of-Purchase Show Star

A durable, permanent display for a decorator product line of spray paints made by Plasti-Kote, Medina, OH, was one of the stars of the Point-of-Purchase Advertising Institute's (POPAI), Englewood, NJ, annual trade show, held in Chicago October 2-4.

The metal and plastic display shows 16 spray paint cans, angled so that the spray nozzles do not become clogged with paint. Each tray base has a pressure sensitive item number and paint color name for restocking ease. The display header and side panel graphics were produced using two paints in the Plasti-Kote color line.

The POPAI show, Marketplace '90, featured over 350 exhibitors displaying the latest P-O-P innovations and over 1,200 program entries into the annual Outstanding Merchandising Achievement (OMA) Awards Contest, in which the best displays in the world vie. ■

MERCHANDISING

Managers, Execs Like Point-Of-Purchase

More than 90% of automotive aftermarket retail store managers say that Point-of-Purchase (POP) advertising is effective in moving products, according to a study prepared for the Point-of-Purchase Advertising Institute (POPAI), Englewood, NJ. In addition, 86% of retail chain executives say that POP boosts sales.

According to POPAI president John M. Kawula, "The automotive aftermarket has been classified as an area 'ripe for the taking' for merchandising. Often these stores beg for effective POP programs to explain, locate, and display products. Perhaps no one is listening to the automotive retailer, however. Our study found that both managers and executives agreed that POP goes far in attracting consumer attention and ringing up sales at the register." In other words, there's both room in stores and interest among retailers for more POP in aftermarket stores according to the industry itself.

For the POPAI study, according to Kawula, "Two separate phases of interviewing were completed for each class (of retailer)—one with the store level manager and then with the headquarters executive. This gives a full picture of how the retailer is prioritizing his POP needs, from the store to the management level."

In all, the study was conducted in 125 retail outlets and 15 chain headquarters.

POP On The Rise

The POPAI study found that more than 91% of automotive retail store managers indicate that they are using the same amount of POP, or more, than they did two years ago. More than 88% of those managers intend to use more, or at least the same amount of, POP in the future.

According to Kawula, "In the automo-

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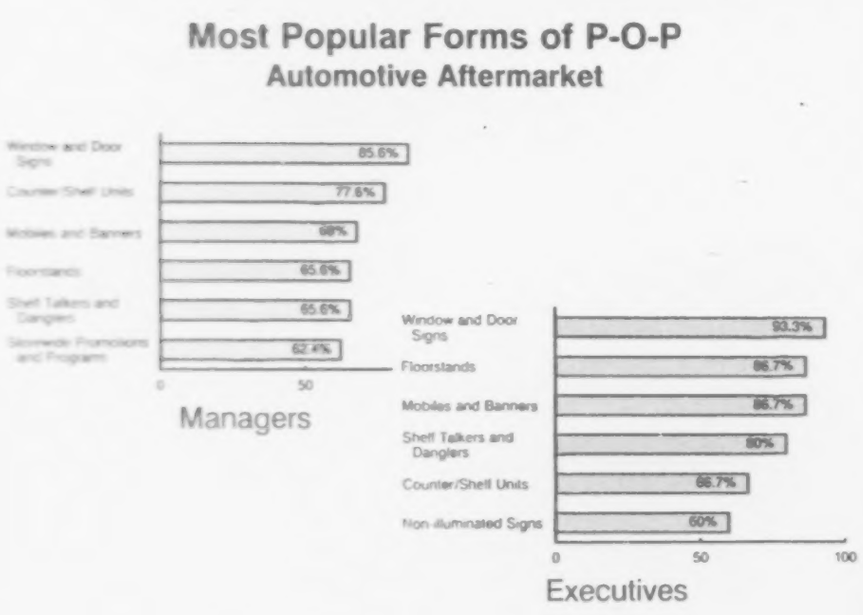
MARKET LINE

According to a Point-of-Purchase Advertising Institute, Englewood, NJ, study, both retail chain executives and store managers favor door and window signs for Point-of-Purchase advertising displays.



tive aftermarket, a majority of managers and executives said they use POP for 'market leaders,' as well as for other brands. In addition, more than 93% of managers and executives indicated that they have used POP for new products and a majority said that POP is more effective when used with new products."

The POPAI study found, said Kawula, that aftermarket retail store managers prefer window and door signs as well as counter and shelf units over other forms of POP such as shelf organizers, sampling devices and electronic or interactive devices. However, chain executives, Kawula said, "cited window and door signs, floor stands, mobiles, and banners as top on their list of preferred POP.

"The message these retailers is sending is obvious," Kawula concluded. "If marketers want to succeed in moving their products off the shelf and into shopping bags, it is essential for them to understand the retailer and his or her plans for POP in the retail environment." ■

ELECTRONIC RETAILING

Auto Parts Club To Debut New Electronic Kiosks

Auto Parts Club, San Diego, operator of two automotive retailing warehouses, will install electronic kiosks. The kiosks will direct shoppers to specific product locations to reduce the need for salesfloor personnel.

The system, based on a new line of computers made by IBM, White Plains, NY, and software by Responsive Data Systems, San Mateo, CA, will use interactive screens that the customers will actually touch, rather than keyboards, to find the locations of the products they want from among the 10,000 SKUs Auto Parts Club stocks.

The customer first touches the name of his or her vehicle on the screen. The image then switches to a list of that brand's models. The customer touches the model he owns. From that, the computer takes the customer through screens that describe the type of model, the year, the system he wants parts for, and the specific product he wants. Then a custom-designed printer produces a list of the items the customer wants and where they can be found in the 40,000 sq. ft. store.

The system is based on an electronic catalog on laser discs made by Kar-Tech, Palm Desert, CA.

"The system will be installed as soon as the final quality control checks are made," Robert W. Fish, president Responsive Data Systems, said.

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REGIONAL MARKETS: A LOOK AT GREENBELT WEST

by **Phil Katcher,** Business Editor

We began our look at the different regions of the country, as defined by their unique geographic, historic, weather and climate, and cultural differences, in January 1987 with a study of the three Western regions—including the area we call Greenbelt West. That's a narrow strip of land bordered by mountains to the East and the Pacific Ocean to the West that runs north from San Francisco to the Canadian border and then skips over Canada into Alaska.

It's a green, lush country with lots of rainfall edged by the ocean on one side and a mountain range on the other. Basic industries that depend on nature are big here: logging, fishing, and farming. But, high-tech industries like Boeing and many computer companies have also taken root here, giving the area a large proportion of well-educated individuals.

The Environment Is Big

Environmental concerns are major in the area. Radical environmentalists even use such tactics against loggers as "spiking." In this move, a steel spike is driven deep into a tree. The invisible spike, when hit by a saw blade, will smash the blade, sending fragments of it around like bullets. Many loggers have been seriously hurt, even maimed for life, by these tactics. Only a handful of environmentalists engage in such tactics, which are disowned by responsible environmental groups. And, environmental groups on the whole enjoy wide popular support in Greenbelt West.

Seattle, whose citizens lead much of the nation in environmental issues, now charges its residents for garbage and trash collection by the amount of refuse they actually produce.

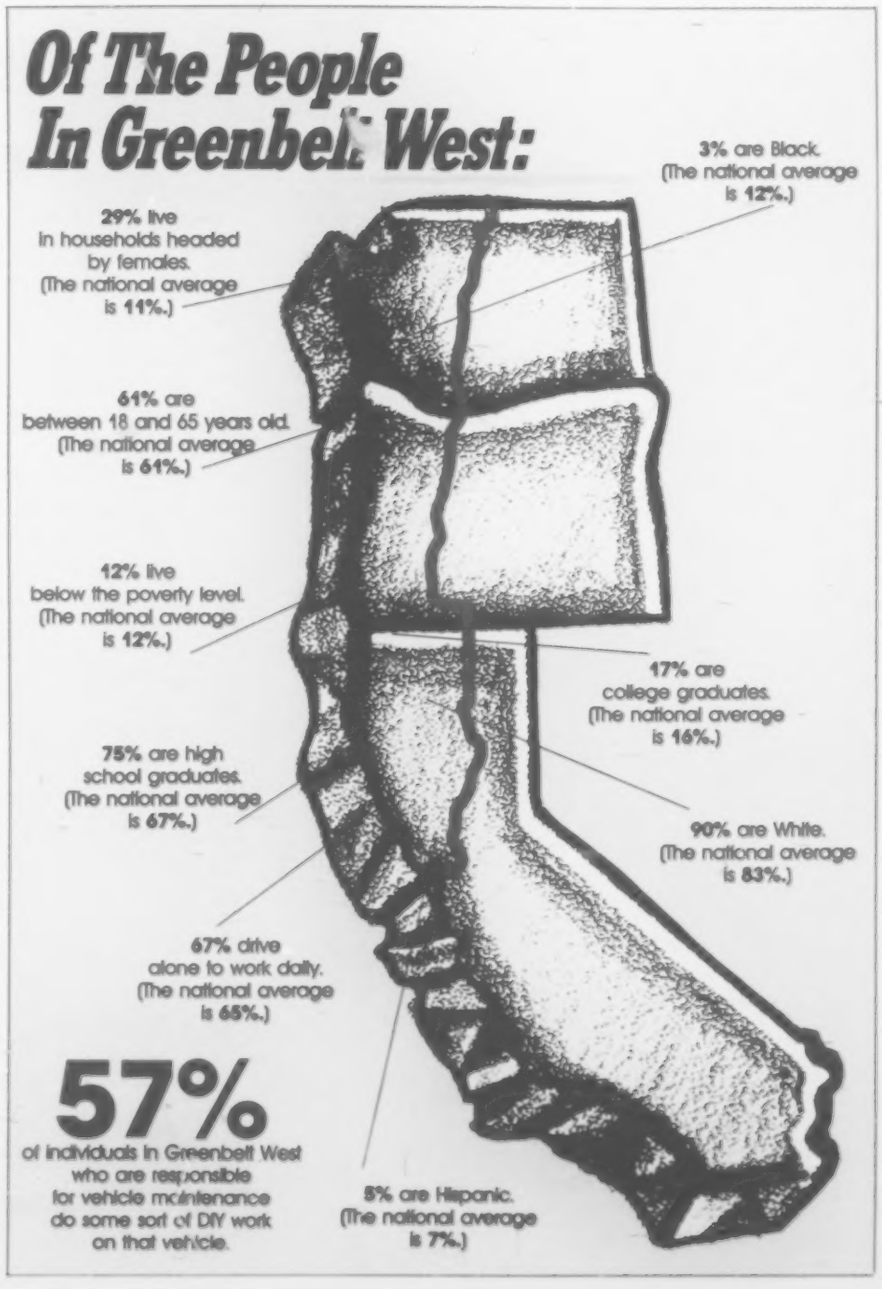
All of this means that automotive aftermarket product manufacturers and retailers stressing environmental safety with their products will find a responsive audience among Greenbelt West DIYers.

Reaching Greenbelt West Drivers

Aftermarket retailers that are involved in local events also do well in Greenbelt West. For example, the climax of the annual Portland, OR, Rose Festival is a CART race held at the Portland International Raceway. One of the sponsors is the 13-store chain G.I. Joe's, a retailer that does a large percentage of its business in aftermarket products. Several days after the CART race, the company sponsors an IMSA Camel GT race on the same site. The store even sells tickets to the events.

Not everyone in Greenbelt West, however, drives the kind of domestic cars that they watch at the races. Locals in the area own a very high percentage of foreign nameplate vehicles, as well as light trucks, when compared to the rest of the country.

Therefore, local retailers that specialize in imported car parts, like Bow Wow Import Auto Supply in Seattle, do quite well here, too. ■


Of The People In Greenbelt West:
3% are Black. (The national average is 12%.)
29% live in households headed by females. (The national average is 11%.)
61% are between 18 and 65 years old. (The national average is 61%.)
12% live below the poverty level. (The national average is 12%.)
17% are college graduates. (The national average is 16%.)
75% are high school graduates. (The national average is 67%.)
90% are White. (The national average is 83%.)
67% drive alone to work daily. (The national average is 65%.)
57%
of individuals in Greenbelt West who are responsible for vehicle maintenance do some sort of DIY work on that vehicle.
5% are Hispanic. (The national average is 7%.)

REGIONAL MARKETS:

In all, 5% of the nation's household vehicle owners live in Greenbelt West, according to the 1990 *Automotive Marketing Consumer Automotive Repair Study (CARS)*. Of them, 50% are DIYers on their own vehicles, while another 7% do automotive DIY work on someone else's vehicle.

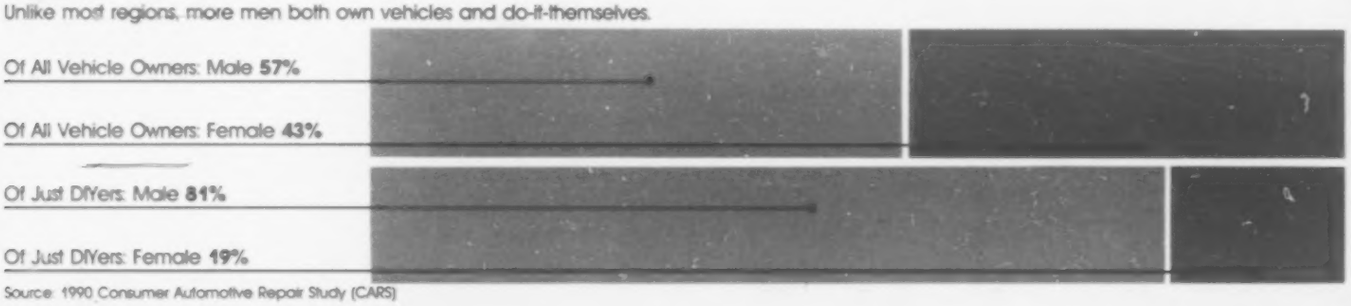
Some 8% of the Greenbelt West DIYers shop for automotive parts, chemicals, and accessories about once a month. Another 9% shop twice a year, obviously for seasonal maintenance efforts, while 16% shop four times a year.

Most Greenbelt West DIYers buy a lot of automotive products over the course of a year. In all, 13% said they bought five automotive products during the past year, while 20% bought 13 or 14 automotive products. In fact, the average Greenbelt West DIYer bought ten automotive products during the year before the *CARS* study was conducted.

On the whole, almost half of all Green-

GREENBELT WEST: GENDER

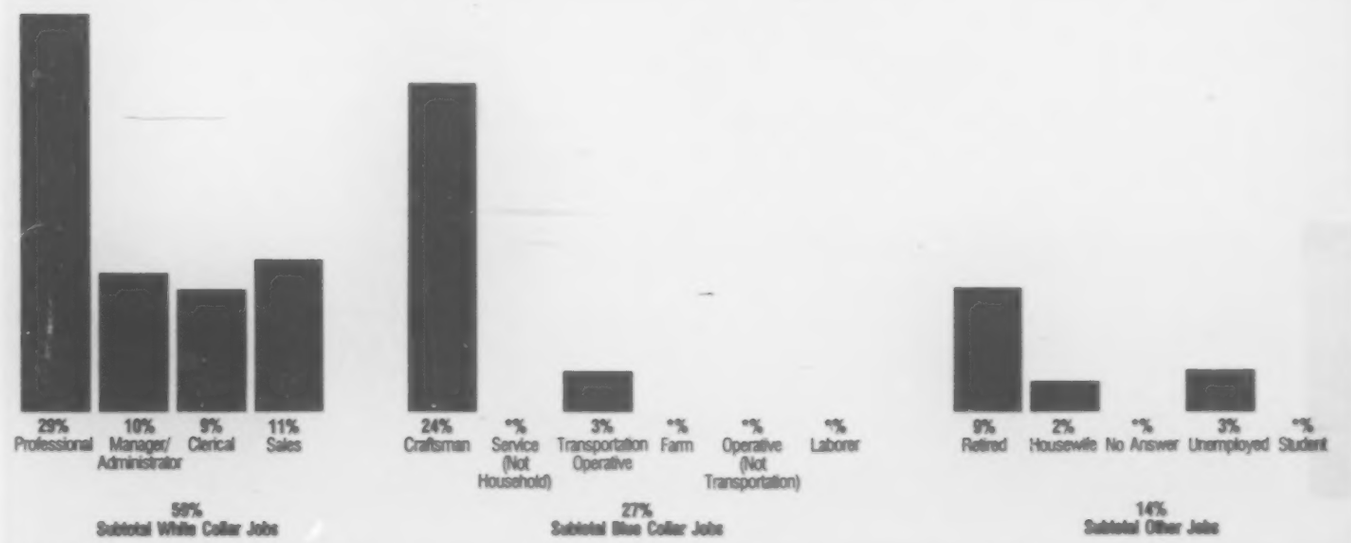
Unlike most regions, more men both own vehicles and do-it-themselves.



Source: 1990 Consumer Automotive Repair Study (CARS)

GREENBELT WEST: DIYERS & THEIR PROFESSIONS

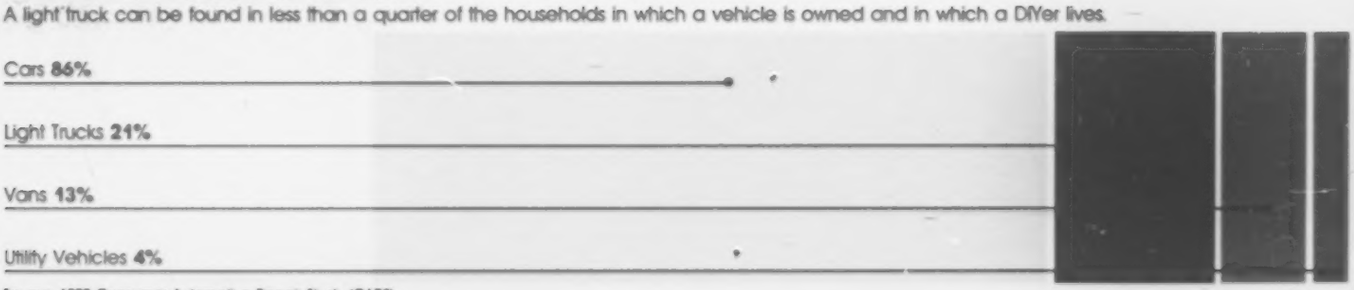
A higher number of farmers, students, service workers, and housewives in the area than in other areas has helped keep the growing white collar professions to less than half the employed population.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers
* Cell too small to accurately measure

GREENBELT WEST: DIYER VEHICLE TYPES

A light truck can be found in less than a quarter of the households in which a vehicle is owned and in which a DIYer lives.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers

GREENBELT WEST: DIYERS & THE VEHICLES THEY OWN

Of Greenbelt West DIYers, many more own a vehicles with a foreign nameplate than do DIYers nationally.

Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding or no responses

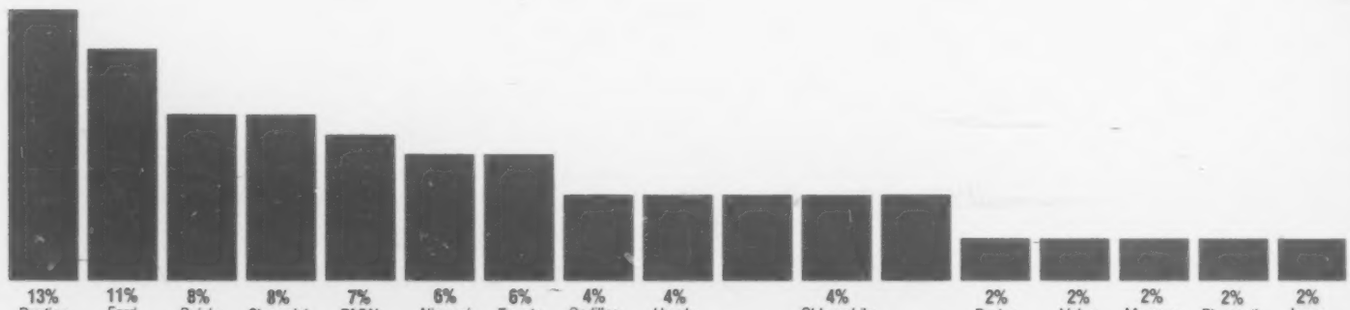
belt West DIYers have maintained the same automotive DIY work level they do, over the past five years. Some 44% of them told us this is the case. Another 31% report they're doing more DIY work now than ever. Over 23% of them expect the amount of automotive DIY work they do to increase in the future, as well.

Of Greenbelt West DIYers, 63% said they enjoy working on their vehicles. Some 17% said they enjoy doing automotive DIY work "a lot" and 45% enjoy it "somewhat." The rest enjoy it "not too much" (22%) or "not at all" (13%).

When asked what new types of DIY jobs they'd like to learn how to do, 12% said tune-up work, while 11% said body work. Another 11% said they'd like to learn how to work on their vehicle's electrical system. Changing oil was a job that 8% would like to learn how to do. Finally, a surprising 6% are really serious about automotive DIY – they want to learn how to rebuild an engine! ■

GREENBELT WEST: DIYERS & THEIR VEHICLES

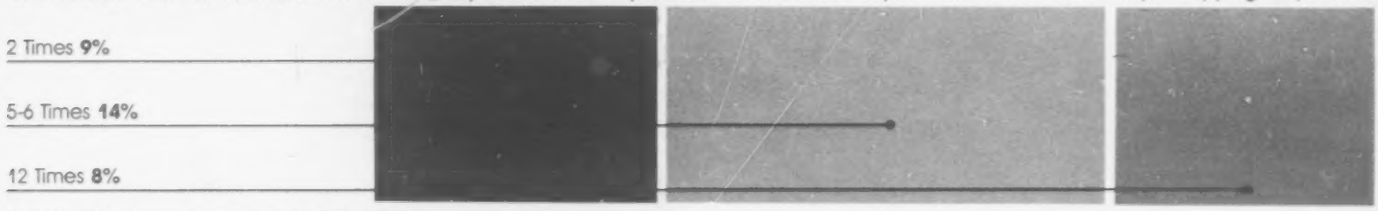
Here's a list of the most popular makes and the percentage of DIYers who own them in Greenbelt West.



Source: 1990 Consumer Automotive Repair Study (CARS)
May not total to 100% due to rounding and multiple answers

GREENBELT WEST: SHOPPING FREQUENCIES

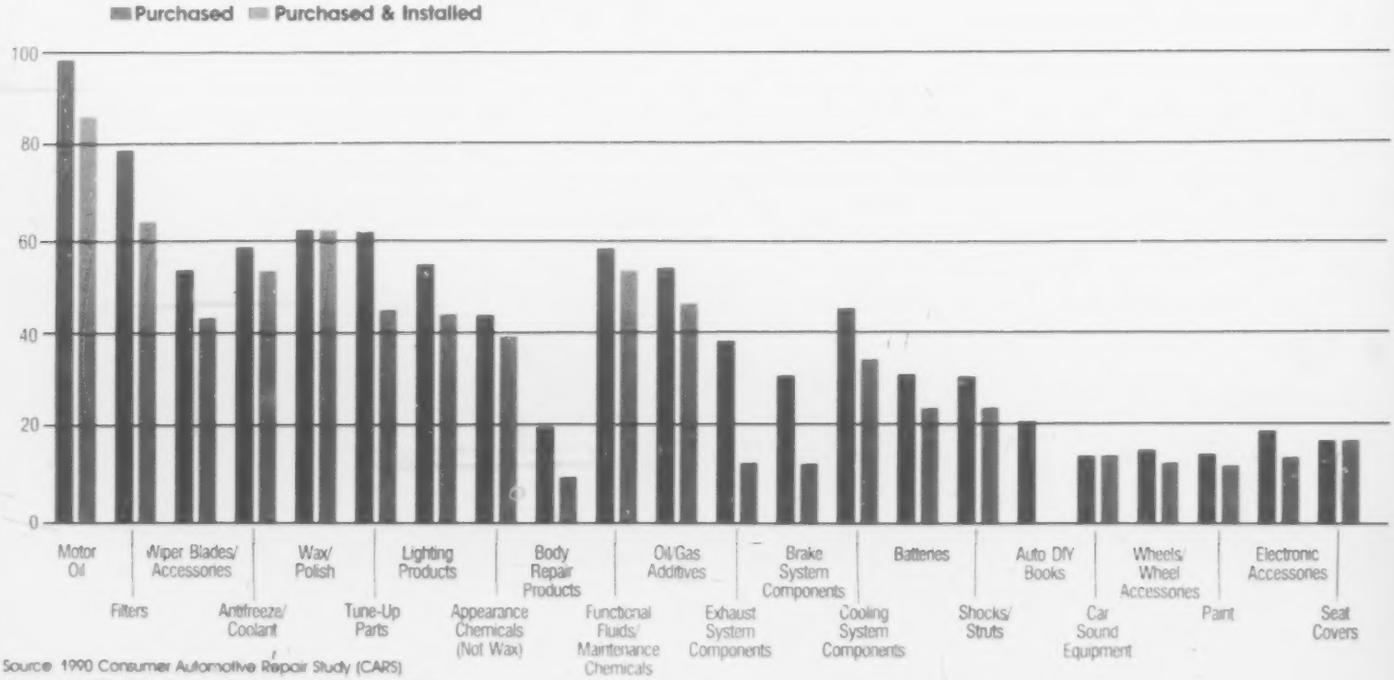
Of Greenbelt West DIYers, almost 15% of them shop for automotive products five or six times a year. Here are the three major shopping frequencies.



Source: 1990 Consumer Automotive Repair Study (CARS)
Does not total to 100% due to omitted responses

GREENBELT WEST: DIYERS & AUTOMOTIVE PRODUCTS

The easier the product is to install, the more DIYers do-it-themselves.



Source: 1990 Consumer Automotive Repair Study (CARS)
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